IMPLEMENTING CRM FOR RESULT TRACKING OF

A CANDIDATE WITH INTERNAL MARKS
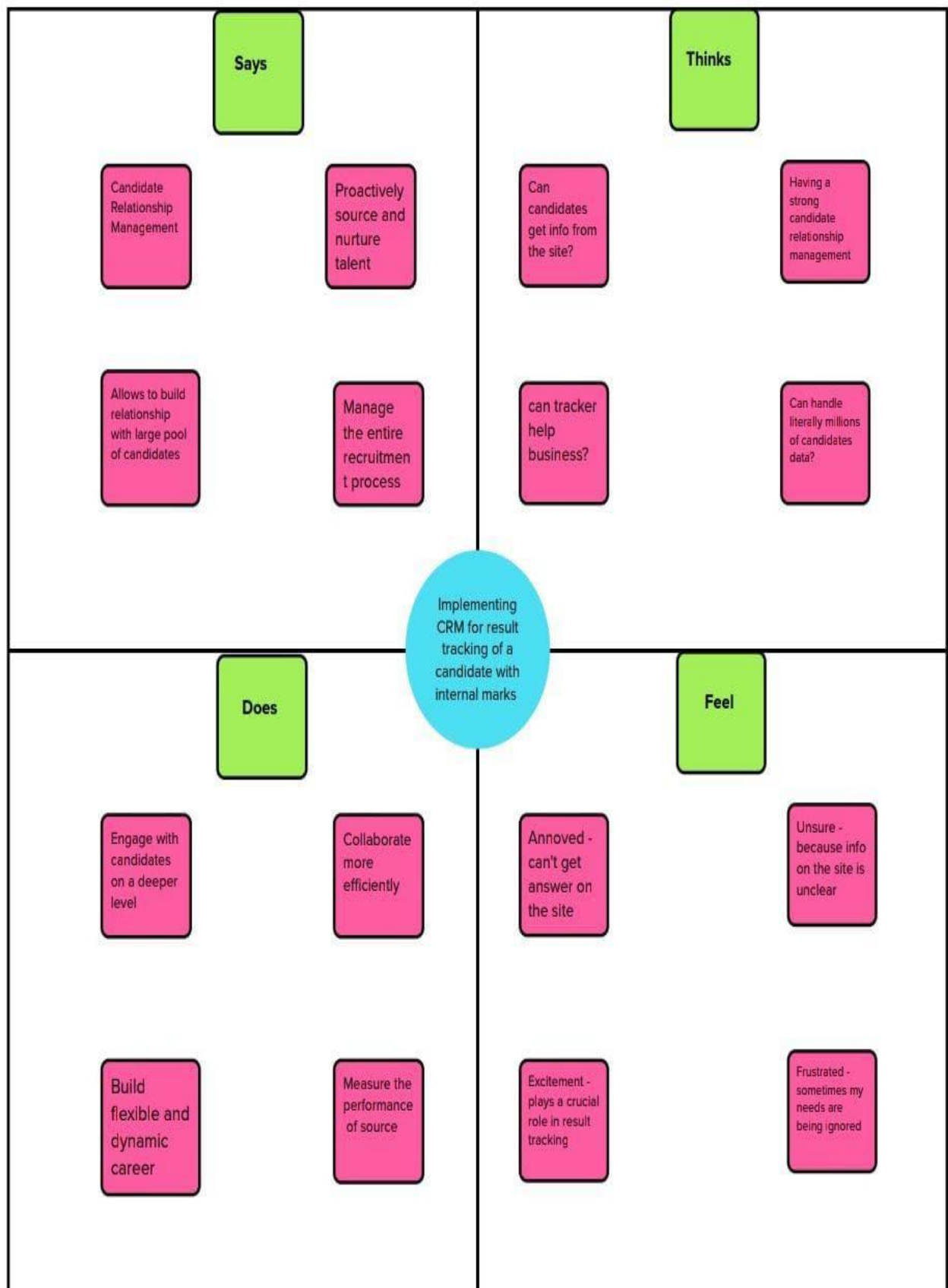
INTRODUCTION:

OVERVIEW:

Administrator should be able to create all base data including Semester, Candidate, Course and Lecturer, Lecturer should have the ability to create Internal Results, Dean, who is one of the Lecturer, should be the only one with ability to update Internal Results, Re-evaluation can be initialized by Candidate for all Internal Results. Now only dean can update the marks after a re-evaluation.

PURPOSE:

It aims to produce areal time knowledge of the salesforce and how can we build a app using salesforce in this project we build a Candidate results card application for educational institutions, which would be useful for the staffs to reduce time and track the performance of the students with ease, it is helpful to have large number of data maintained under one platform.

PROBLEM DEFINITION AND DESIGN THINKING

EMPATHY MAP

Says

- Candidate Relationship Management
- Proactively source and nurture talent
- Allows to build relationship with large pool of candidates
- Manage the entire recruitment process

Thinks

- Can candidates get info from the site?
- Having a strong candidate relationship management
- can tracker help business?
- Can handle literally millions of candidates data?

Implementing CRM for result tracking of a candidate with internal marks

Does

- Engage with candidates on a deeper level
- Collaborate more efficiently
- Build flexible and dynamic career
- Measure the performance of source

Feel

- Annoyed - can't get answer on the site
- Unsure - because info on the site is unclear
- Excitement - plays a crucial role in result tracking
- Frustrated - sometimes my needs are being ignored

IDEATION AND BRAINSTORING MAP

Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

- 🕐 **10 minutes** to prepare
- ⏳ **1 hour** to collaborate
- 👤 **2-8 people** recommended

💬 Share template feedback

Before you collab

A little bit of preparation with this session. Here's to do to get going.

🕐 10 minutes

A **Team gathering**
Define who should partic
invite. Share relevant info

B **Set the goal**
Think about the problem
the brainstorming sessio

C **Learn how to use the fa**
Use the Facilitation Supe
productive session.

Open article →

2

Brainstorm

Write down any ideas that come to mind
that address your problem statement.

⏱ 10 minutes

Person 1

Assess the CRM needs and set goals	Failure to properly estimate effort	Understands your business model and strategy
Improved Informational Organization	Understanding the Customer's Needs	

Person 2

Choose the corrects CRM application	Failure to control scope	Not deep experience and enthusiastic with the speed of CRM products they set implement
CRM for Enhanced Communication	Listening for What the Customer is Saying	

Person 3

Build an Implementation team	Failure to dedicate the right internal resources	Reviders to have understand of your project's team any before experiment even begins
CRM Improves your customer service	Understandin g the Company's Needs	

Person 4

Create a change management plan	Failure to invest time and effort to getting user adoption and buy-in	Advices you on best practices and your technology roadmap
Improved Analytical Data and Reporting	Integrating Marketing and Relationship Strategies	

Person 5

Person 6

Person 7

Person 8

4
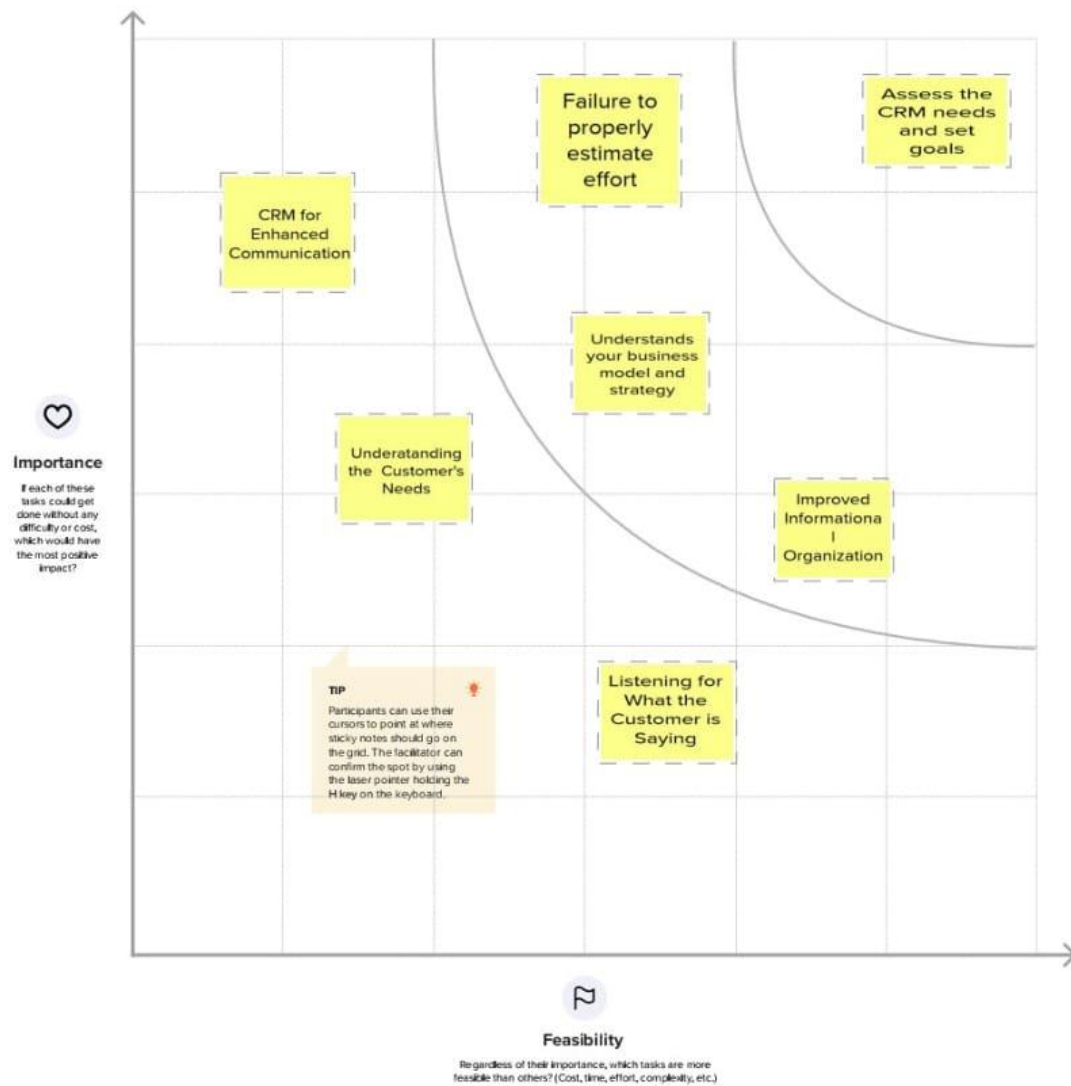
Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

🕐 20 minutes

♡
Importance

If each of these tasks could get done without any difficulty or cost, which would have the most positive impact?

CRM for Enhanced Communication

Failure to properly estimate effort

Assess the CRM needs and set goals

Understands your business model and strategy

Underatanding the Customer's Needs

Improved Informational Organization

TIP 💡

Participants can use their cursors to point at where sticky notes should go on the grid. The facilitator can confirm the spot by using the laser pointer holding the H key on the keyboard.

Listening for What the Customer is Saying

⚑
Feasibility

Regardless of their importance, which tasks are more feasible than others? (Cost, time, effort, complexity, etc.)

RESULT

OBJECT NAME	FIELDS IN THE OBJECT
SEMESTER	FIELD LABEL: SEMESTER NAME COURSE(LOOKUP) DATA TYPE: TEXT
CANDIDATE	FIELD LABEL: CANDIDATE NAME CANDIDATE ID SEMESTER NAME INTERNAL RESULTS (LOOKUP) DATA TYPE: TEXT
COURSE DETAILS	FIELD LABEL: COURSE NAME COURSE ID DATA TYPE: TEXT
LECTURER DETAILS	FIELD LABEL: LECTURER ROLE LECTURER NAME COURSE ID COURSE(LOOKUP) DATA TYPE: TEXT

	FIELD LABEL:
INTERNAL RESULTS	CANDIDATE ID COURSE ID MARKS DATA TYPE: TEXT

ACTIVITY AND SCREENSHOT

Milestone1: Creation salesforce org

Introduction

Are you new to salesforce ? Not show exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answer yes to any of these questions, then you're in the right place. This module is for you.

Welcome to salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward "What is Salesforce, anyway?"

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this.

https://youtu.be/r9EX3IGde5k

Activity 1:

Creating Developer Account

Creating a developer org in salesforce.

1. Go to developers.salesforce.com/

2. Click on sign up.

3. On the sign up form, enter the following details:

    a. First name & Last name

    b. Email

    c. Role: Developer

    d. Company: College Name

    e. Country: India

    f. Postal Code: pin code

    g. Username: should be a combination of your name and company

    This need not be an actual email id, you can give anything in the format:

username@organization.com

Click on sign up after filling these.
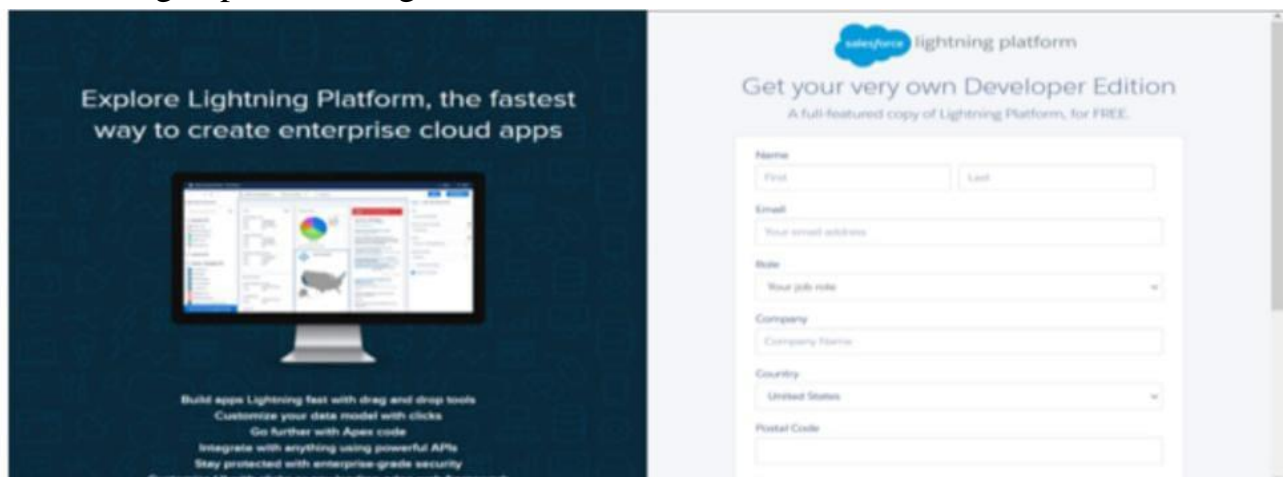
Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as
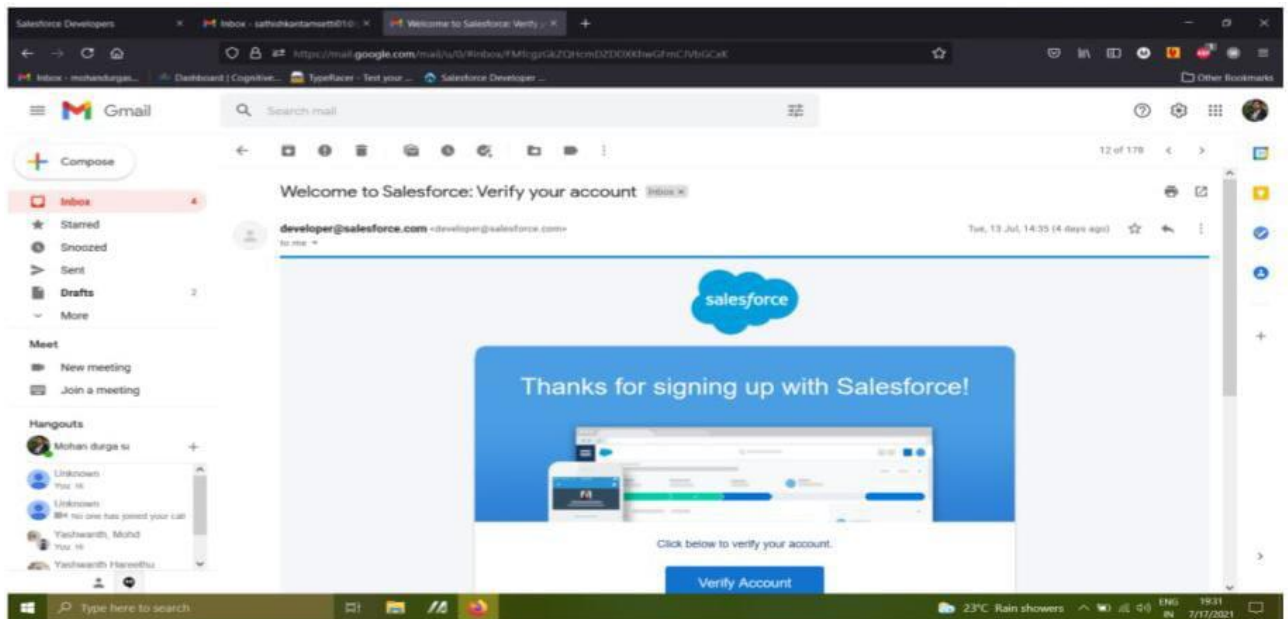
Login To Your Salesforce Account

1. Go to salesforce.com and click on login.

2. Enter the username and password that you just created.

3.After login this the home page which you will see.

Salesforce Login

https://login.salesforce.com
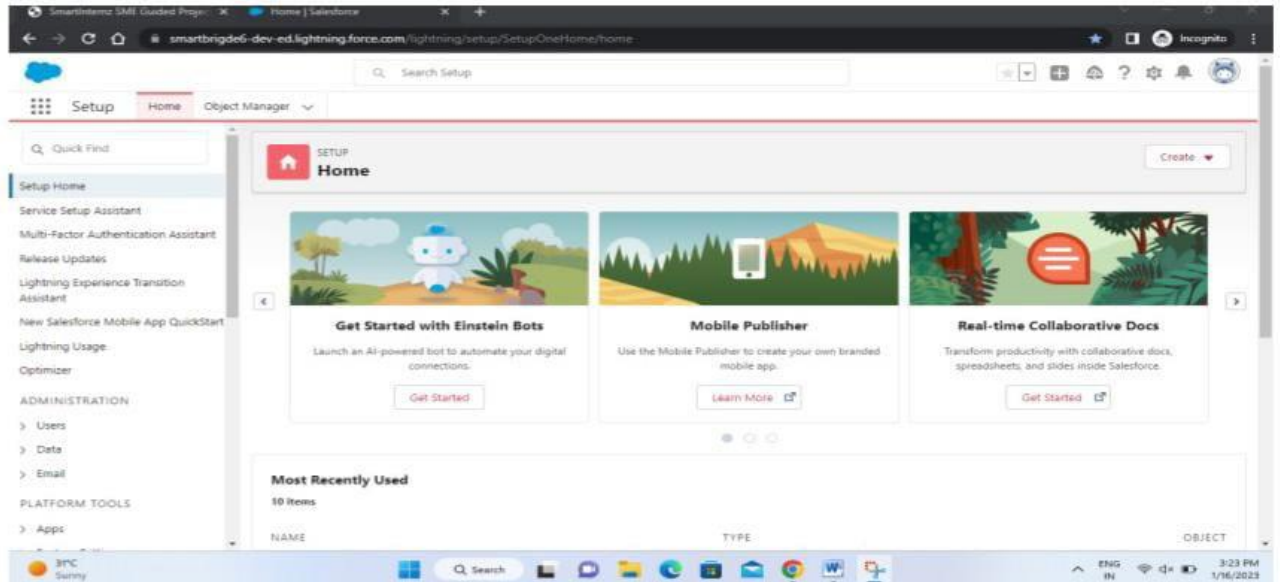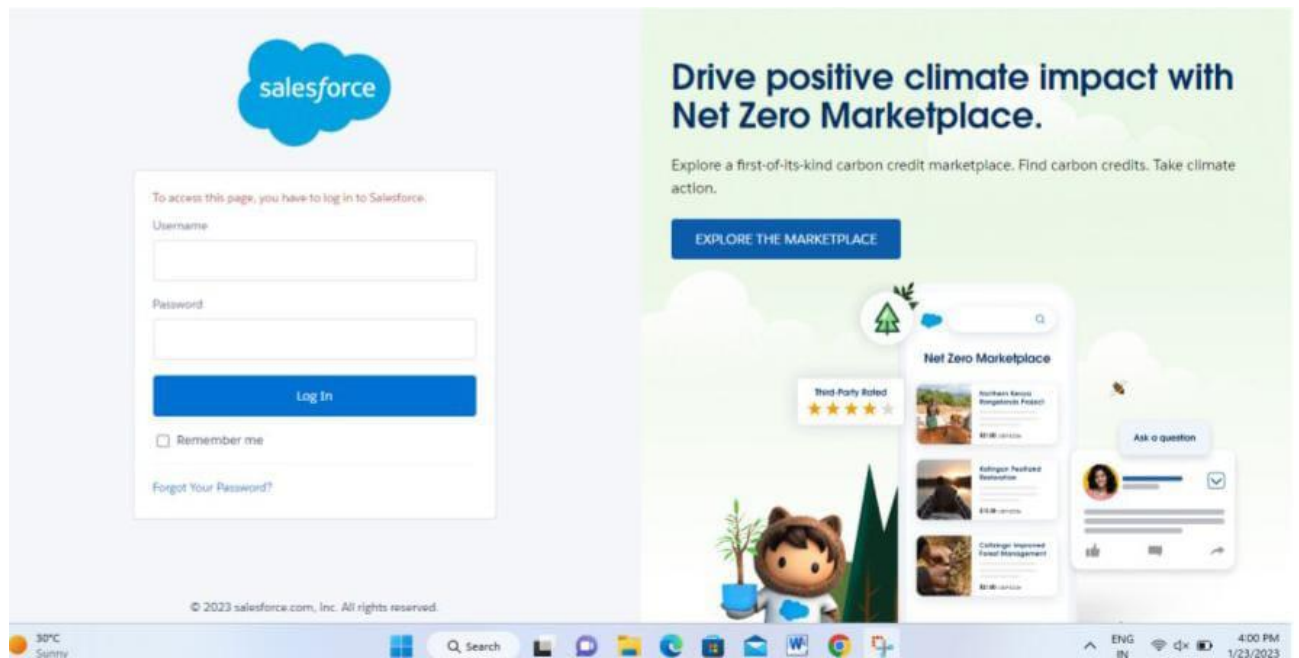
Milestone-2: Object

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

Custom objects:

1. Semester

2. Candidate

3. Course Details

4. Lecturer Details

5. Internal Results

Activity-1:

To create an object:

Creation of Objects for Candidate Internal Result Card, For this Candidate Internal Result Card we need to create 5 objects i.e. Semester, Candidate, Course Details, Lecturer Details, Internal Results.

The below steps will assist you in creating those objects.

- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, have a look on the extreme right you will find a Create

  Dropdown click on that and select Custom Object.

On the Custom Object Definition page, create the object as follows:

- Label: Semester
- Plural Label: Semesters
- Record Name: Semester Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs
- Under Custom Object Tabs, click New
- For Object, select Semester
- For Tab Style, select any icon
- Leave all defaults as is. Click Next, Next and Save

To Navigate to Setup page:

Click on gear icon ⟶ click setup
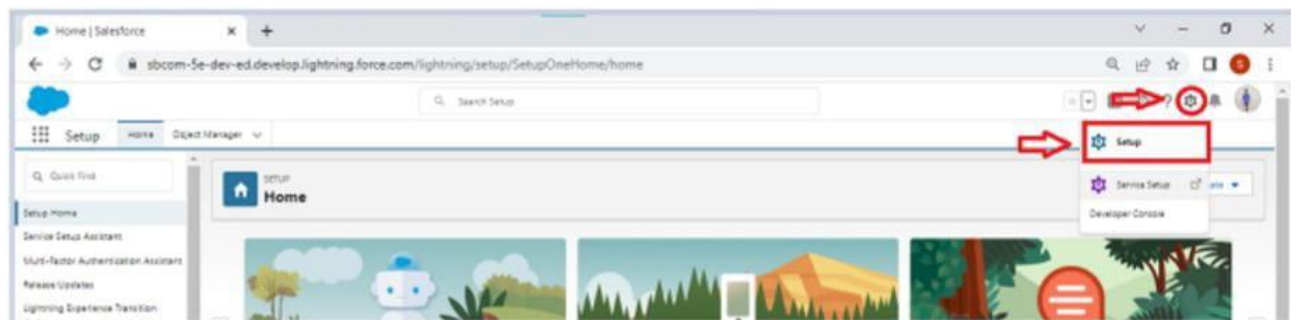
To create an object:

From the setup page ⟶ Click on Object Manager ⟶ Click on Create ⟶ Click on Custom Object

On Custom object defining page:

Enter the label name, plural label name, click on Allow reports, Allow search ⟶

Save

Activity-2: Follow Similar steps to create Candidate, Course Details, Lecturer Details, Internal Results Objects.

Milestone-2:Fields and Relationship

An object relationship in Salesforce is a two-way association between two objects.

Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Activity-1:

Creation of fields:

- Click the gear icon and select Setup. This launches Setup in a new tab.
- Click the Object Manager tab next to Home.
- Select semester
- Select Fields and Relationships from the left navigation, and click New Now ready to make a custom field. Let's do this!
- Select the Text as the Data Type, then click Next.
- For Field Label, Enter Semester Name.
- Click Next, Next, then Save.

To create fields in an object:

Go to setup ⟶ click on Object Manager ⟶ type object name in search bar ⟶

Click on the object.
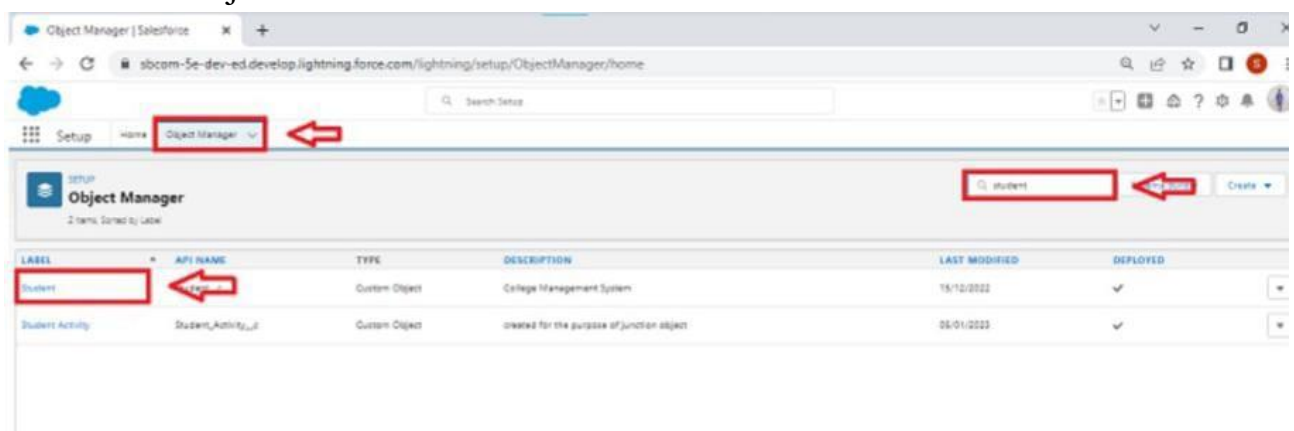
Now click on "Fields & Relationships" ⟶ New
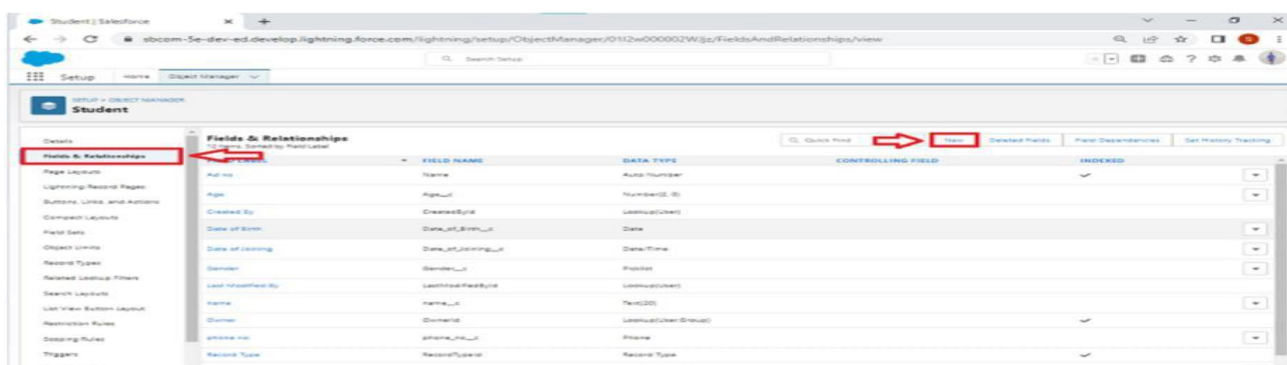
Fill the field label name ⟶ Next ⟶ Next ⟶ Save

Activity-2: Similarly Create Following Fields according to the objects.

Semester:	Candidate:	Course Details:	Lecturer Details:	Internal Results:
Semester Name	Candidate Name	Course Name	Lecturer Role	Candidate ID
Course(lookup)	Candidate ID	Course ID	Lecturer Name	Course ID
	Semester Name		Course ID	Marks
	Internal Results(lookup)		Course(lookup)	

Milestone-3:Lightning App

Apps in salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.
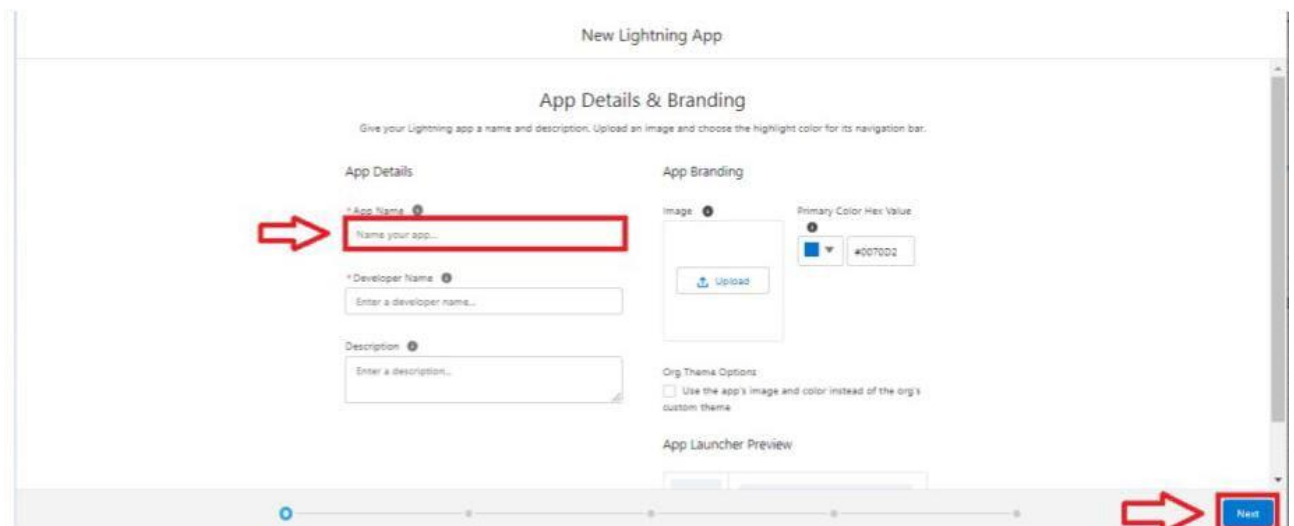
Activity-1:

Create the Candidate Internal Result Card app:

To create a lightning app page:

Go to setup page ⟶ search "app manager" in quick find ⟶ select "app manager"
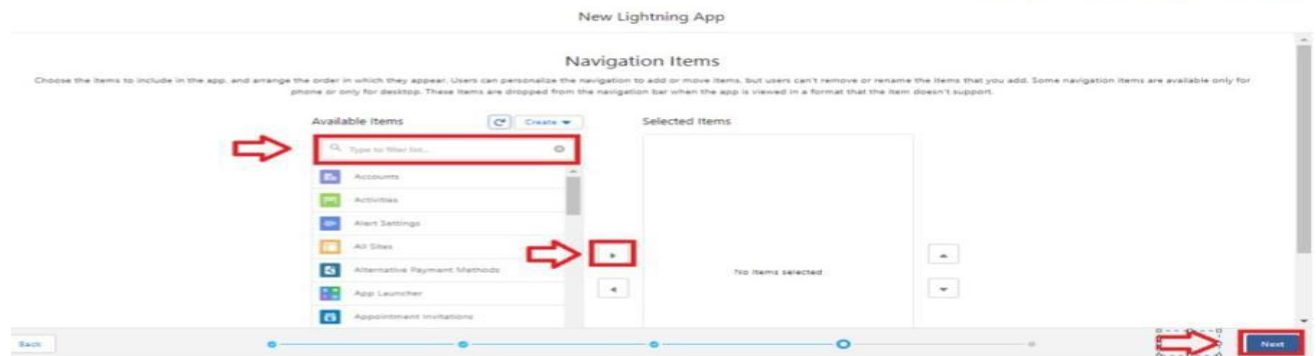
⟶ Click on New lightning App
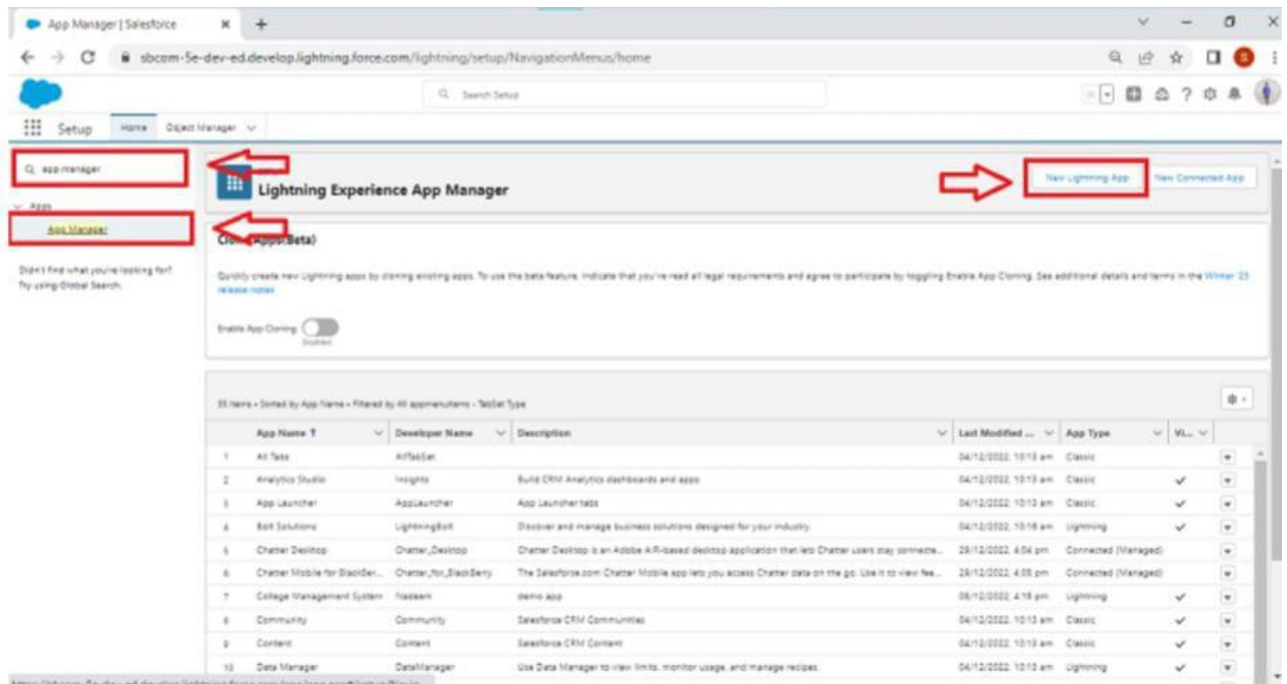
Fill the app name in app details and branding $\longrightarrow$ Next $\longrightarrow$ (App option page) keep it as default $\longrightarrow$ Next $\longrightarrow$ (Utility Items) keep it as default $\longrightarrow$ Next $\longrightarrow$ (Add Navigation Items) $\longrightarrow$ Next $\longrightarrow$ (Add User Profile) Add System Administrator $\longrightarrow$

Next

To Add Navigation Items:

Select the items from the search bar and move it using the arrow button ⟶ Next

To Add User Profiles:

Search profiles in search bar ⟶ click on the arrow button ⟶ Save & finish.

Milestone-4:Users

Activity 1:

Creating a Users:

1. From Setup, in the Quick Find box, enter Users, and then select Users

2. Click New User

3. Enter the user's name John Martin and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address

4. Select a Role(none)

5. Select a User Licence As salesforce

6. Select a profile as Salesforce User

7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email
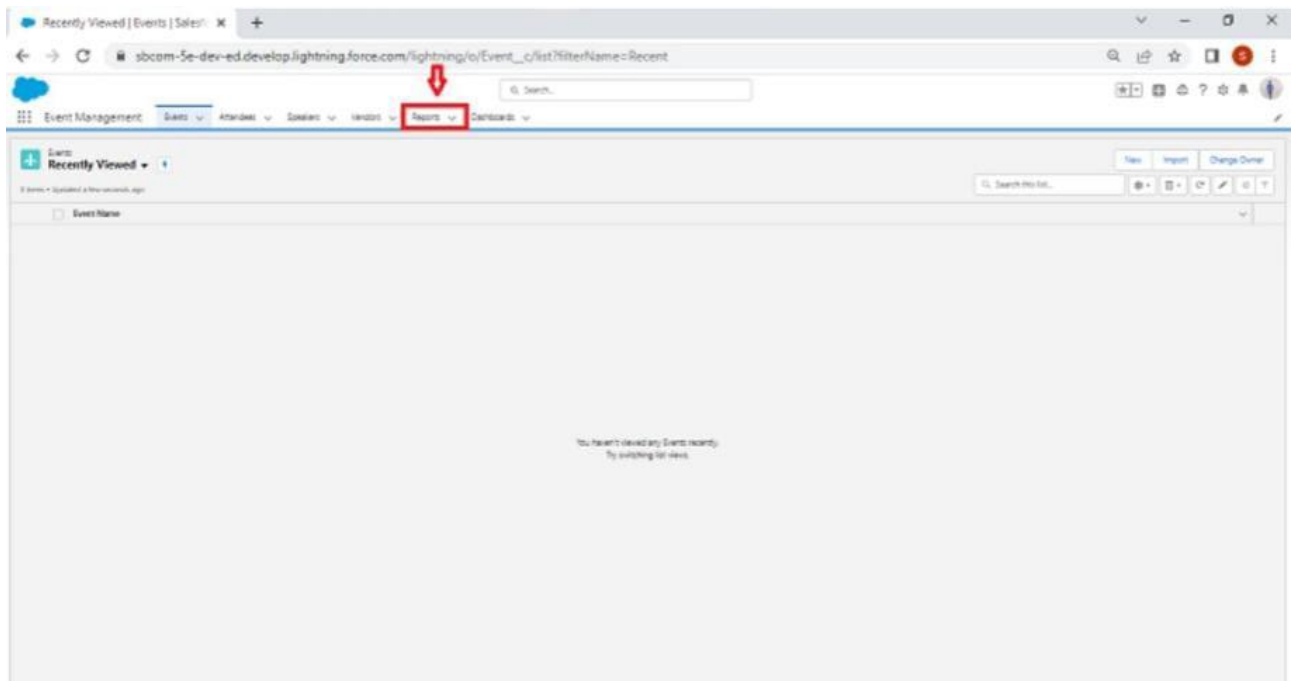
Milestone-5:Reports

Activity 1:

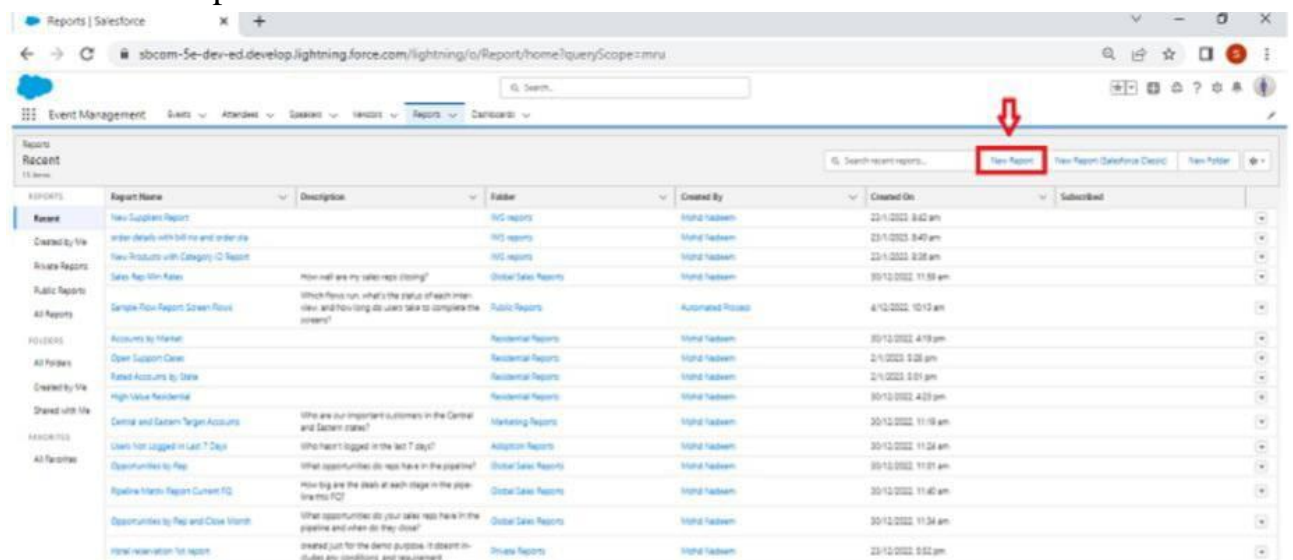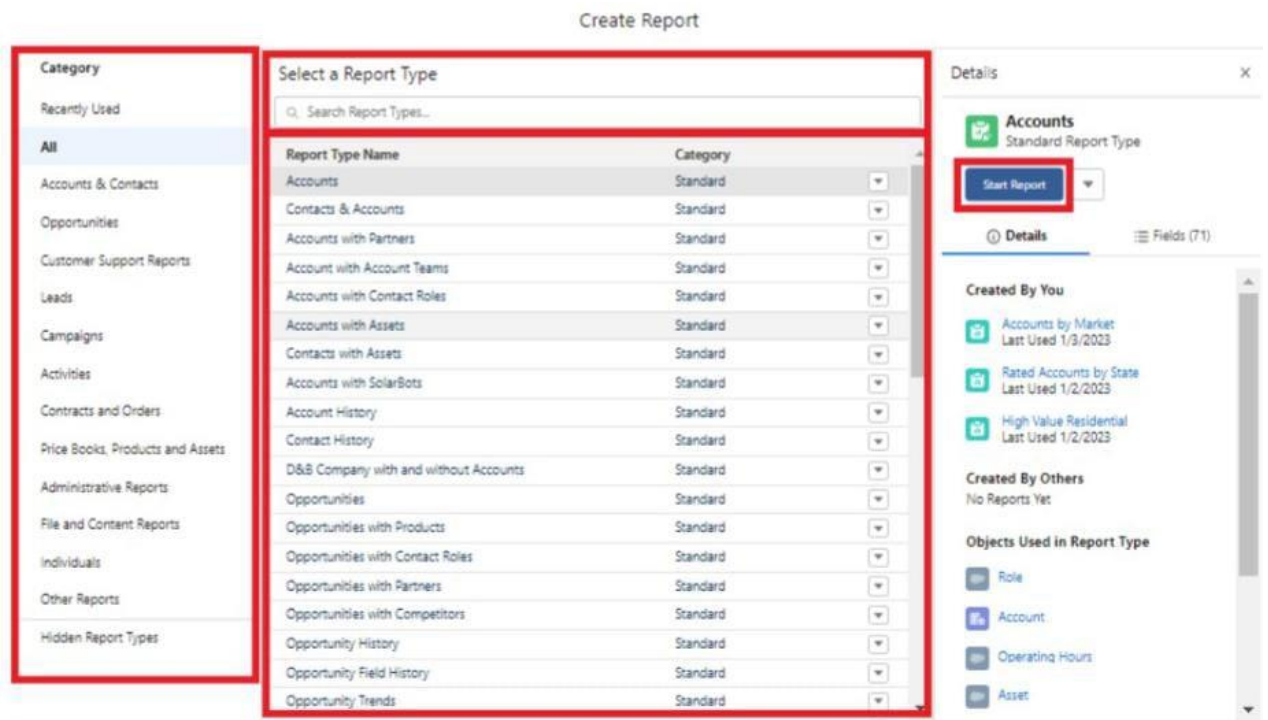**Reports and dashboards:**

To create a report:
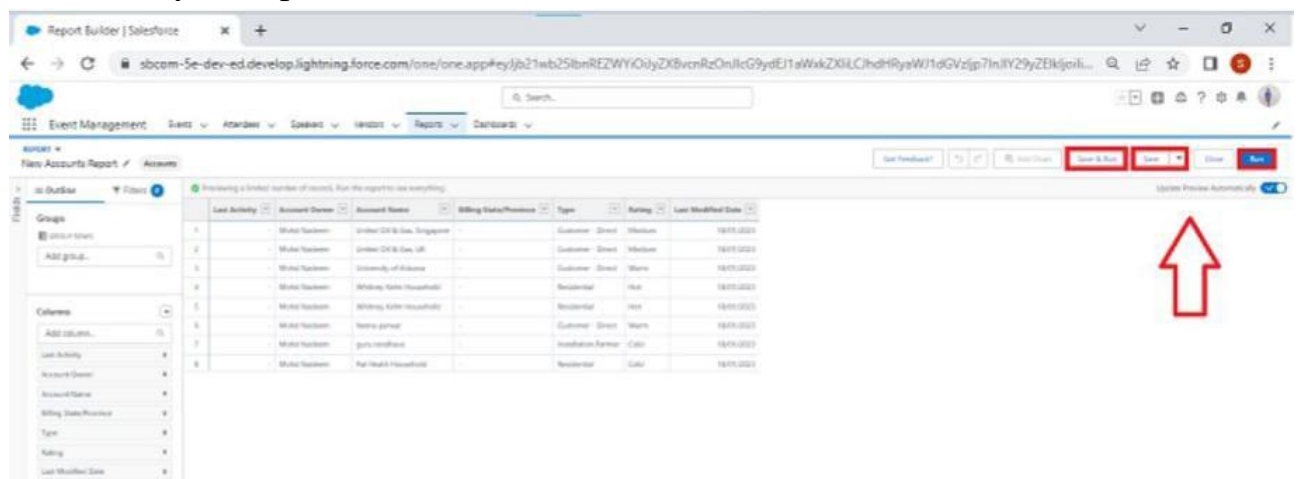
Go to the app → click on the reports tab

Click New Report

Select report type from category or from report type panel or from search panel →
click on start report

Customize your report, then save or run it.

Milestone-6:Dashboards

Activity 1:

Create a Dashboard:

1. Click the Dashboard tab

2. Click New Dashboard

3. Name your dashboard Candidate Board. Leave all other fields as is and click Create

4. Click + Component

5. For Report, select Candidate Marksby Stage. Click Select

6. For Display As, select Vertical Bar Chart and click Add

7. Click Save

8. Click Done

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TRAILHEAD PROFILE PUBLIC URL

</div>

Team Leader: https://trailblazer.me/id/hharishma2

Team Member 1: https://trailblazer.me/id/gjothi6

Team Member 2: https://trailblazer.me/id/dhsri20

Team Member 3: https://trailblazer.me/id/m7603

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ADVANTAGES & DISADVANTAGES:

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Advantages:

- It allows for the consolidation of customer data and the basis for deep insights
- It speeds up the sales conversion process
- It increases staff productivity, lowering time-cost
- It allows geographically dispersed teams to collaborate effectively
- Improves customer experience by allowing personalization and improved query resolution

Disadvantages:

- It may not suit every business
- It requires a process-driven sales organization
- The excess initial time and productivity cost of implementation
- Security concerns associated with centralized data
- Staff over-reliance on CRM may diminish customer loyalty through a bad experience

APPLICATIONS:

- I want something reliable

- Target marketing
-
- Increase candidate quality
- Can work easily
- Streamlining internal sales processes

CONCLUSION:

Student Internal Mark Management System deals with student details, academic related reports, college details and course details. It tracks all the details of a student from the day one to the end of his course which can be used for all reporting purpose, tracking of progress in the course, completed semester details, exam details, project or any other assignment details, and final exam result.

FUTURE SCOPE:

Scope of education means range of view, outlook, field or opportunity of activity, operation and application of education. Education has a wider meaning and application.